PERFORMANCE EVALUATION FOR TRANSFERS & SEPARATIONS (PETS)

When an employee transfers within or separates from state government for reasons other than documented disciplinary action, disability, illness or death, the Performance Evaluation for Transfers and Separations (PETS) task should be used. This task is available regardless of the length of time the employee's performance plan has been in place.

The manager should use this task for these reasons:

1) Separation – (From State Employment)
2) Internal Transfer – (Within the Same Agency)
3) External Transfer – (Agency-to-Agency)
4) Manager Feedback – (from Separating or transferring Manager)
5) Retirement (Optional)

If the employee transfers or separates during the Interim Review (IR) or Annual Performance Evaluation (APE), the managers will assess and document the performance of the employee by completing the IR or APE.

Before launching the PETS task, the manager should ask the employee to update his/her goal progress and add goal-specific comments and attachments, if necessary.

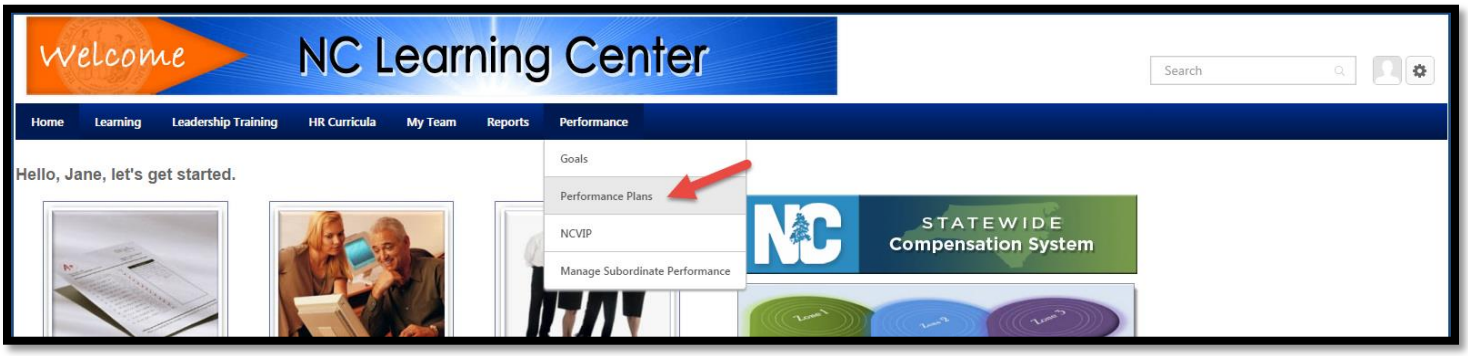
Note: This task must be completed in its entirety prior to the action being processed in Beacon. For employee transfers, when HR processes the action, the NCVIP system will automatically transfer performance feedback entered by the previous manager.

Upon notice that an employee is transferring or separating, the manager should launch the PETS task. Once launched, there is a total of ten (10) calendar days to complete the entire task.

STEP 1: Manager Launches PETS Task

Steps you should take:

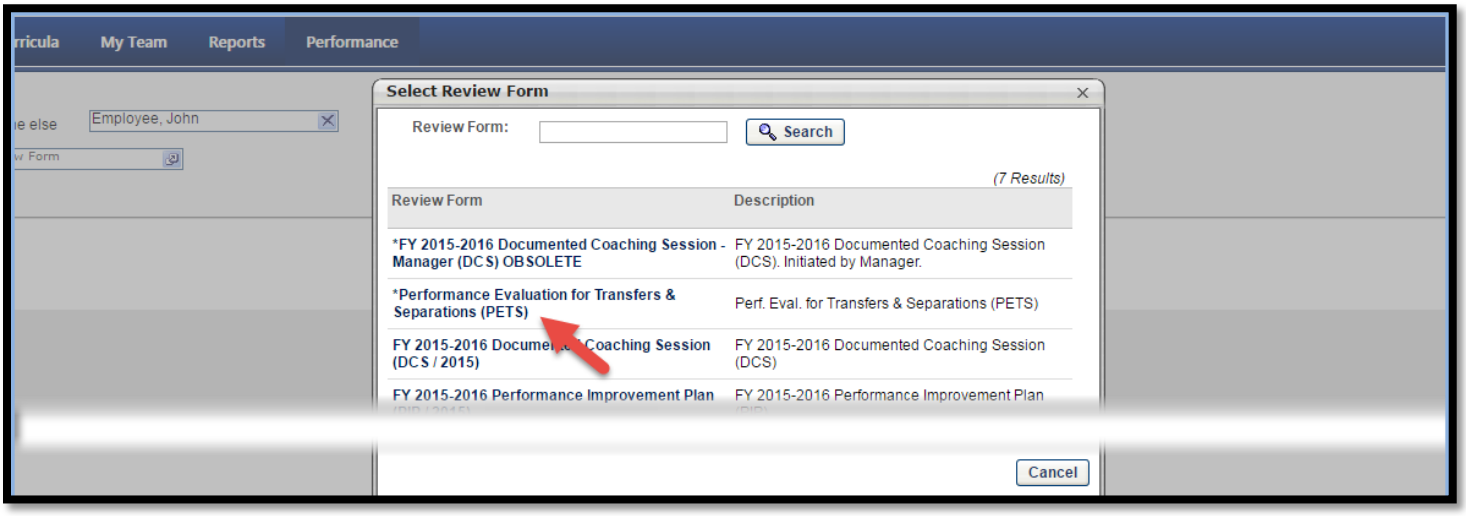
1. Manager/Supervisor: In NC Learning Center: Click "**Performance Plans.**"



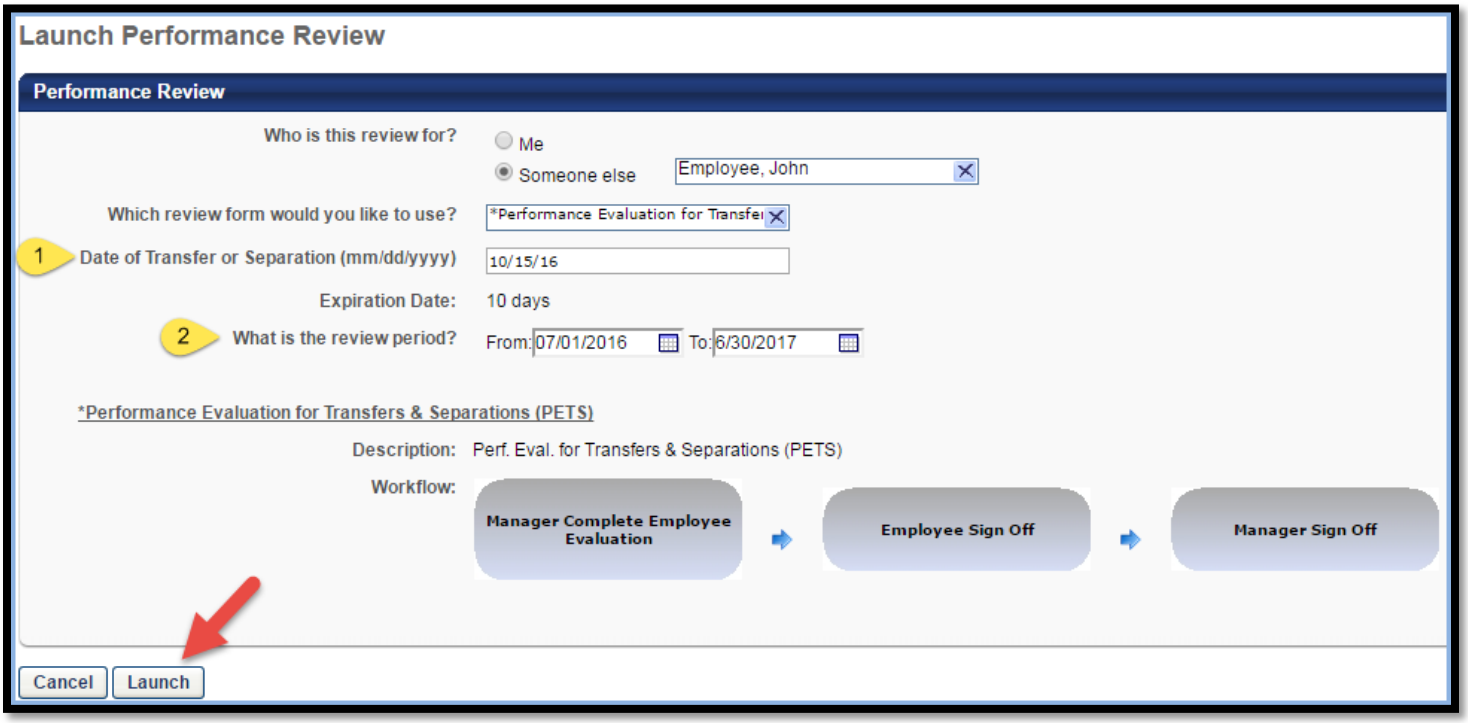
2. Click on the **"Launch Review"** button.

3. (1) Select the radio button for "**Someone else**". (2) Click the pop up button on the right and type in the employee's name. (3) Click on the pop up button to select the Review Form.

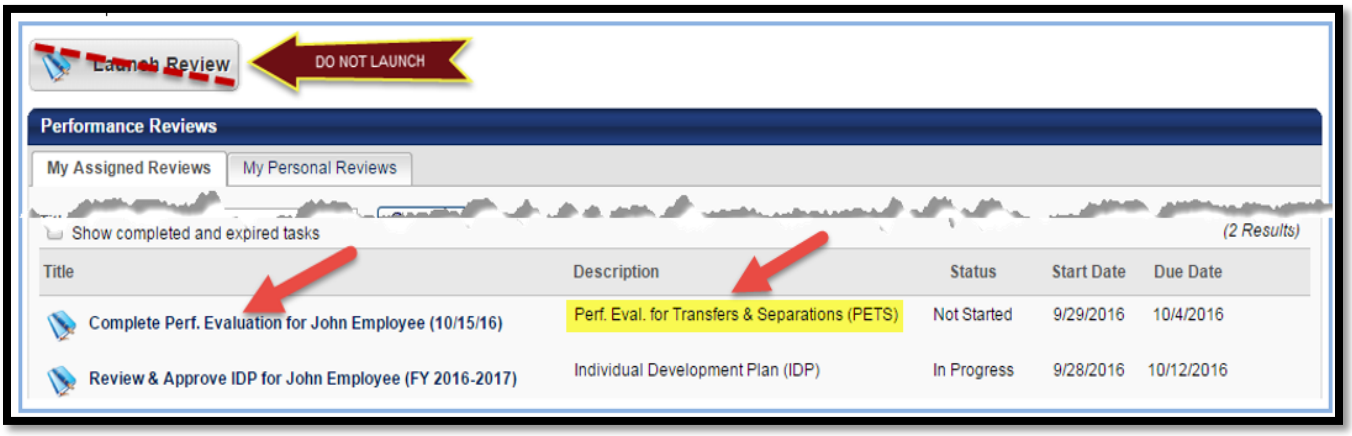
4. In the Pop up box, select the form labeled, "**Performance Evaluation for Separating Employee (PETS).**"



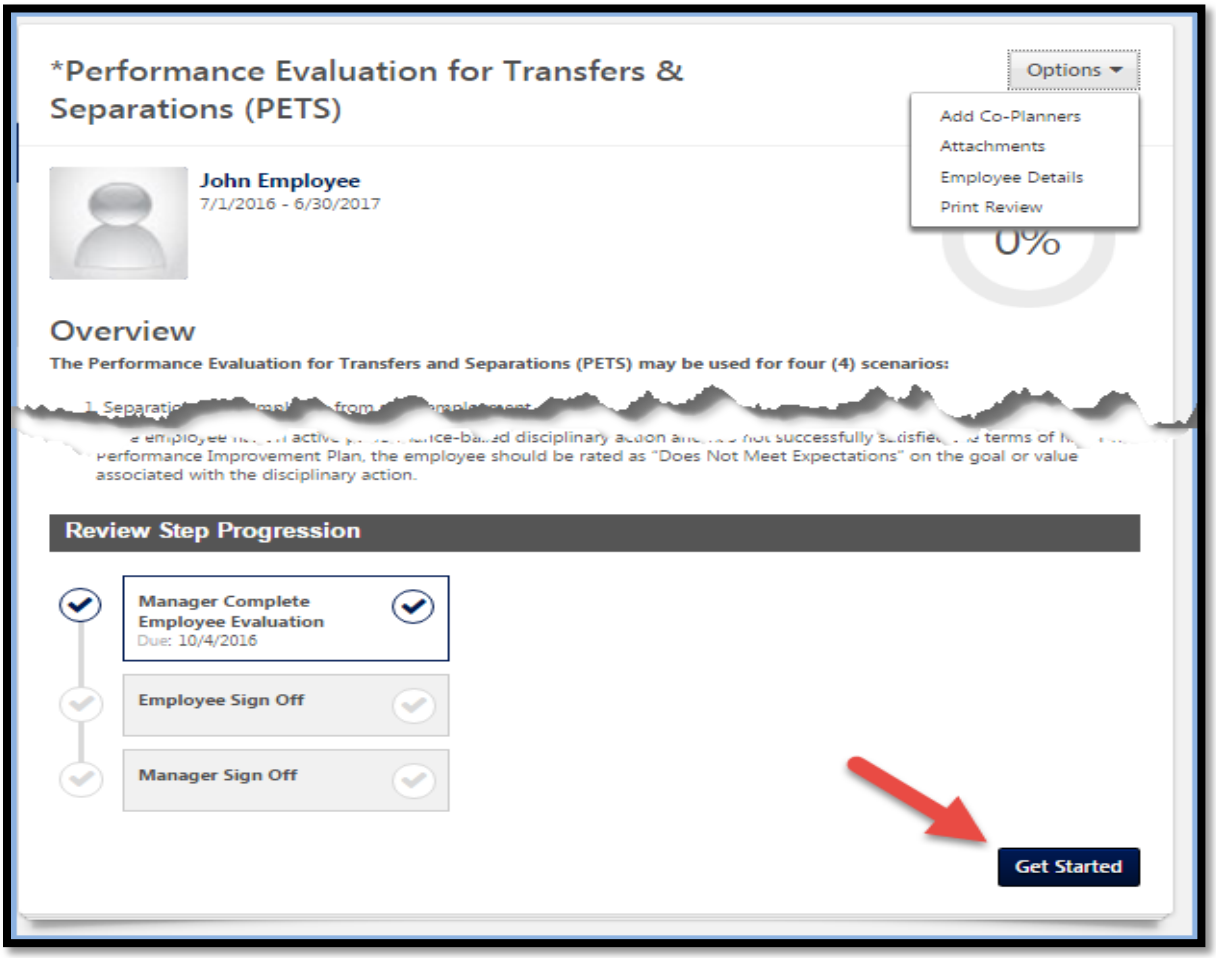
5. (1) Enter the <u>Date of Transfer or Separation.</u> Contact your HR Representative at your facility to determine the transfer/separation date. (2). Enter the <u>Review Period</u>. The Review Period should cover the time period the employee spent under the Performance Plan. For example, if the employee is separating on 10/15/16 during the 7/1/16-6/30/17 cycle, you would enter 7/1/16 – 10/15/16. Once this information has been entered, click **"Launch."**



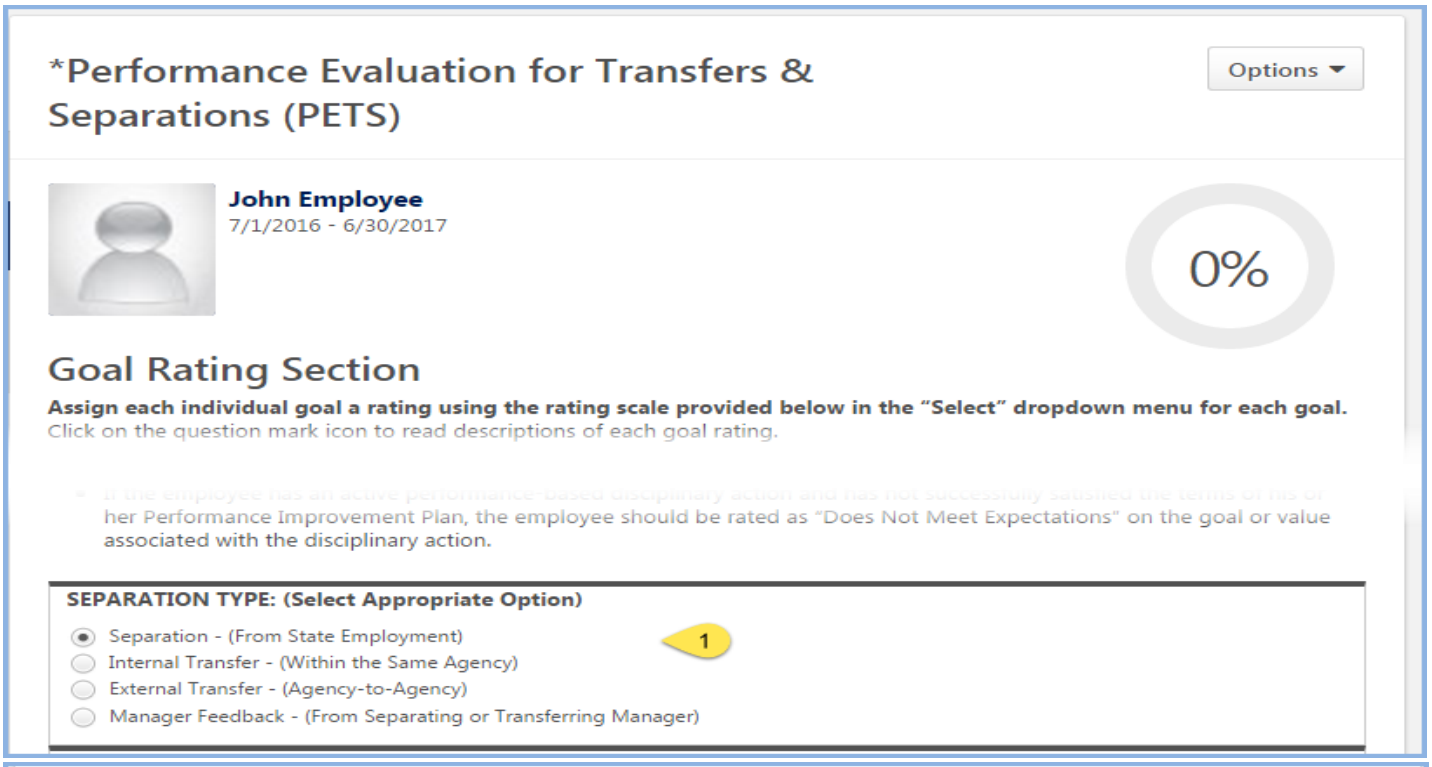
6. Once you click "**Launch**" in the step above, you will be automatically sent to the Performance Plans Summary page. DO NOT CLICK "LAUNCH REVIEW" at this step in the process. Find the "**Separation**" task you just created and click on it.

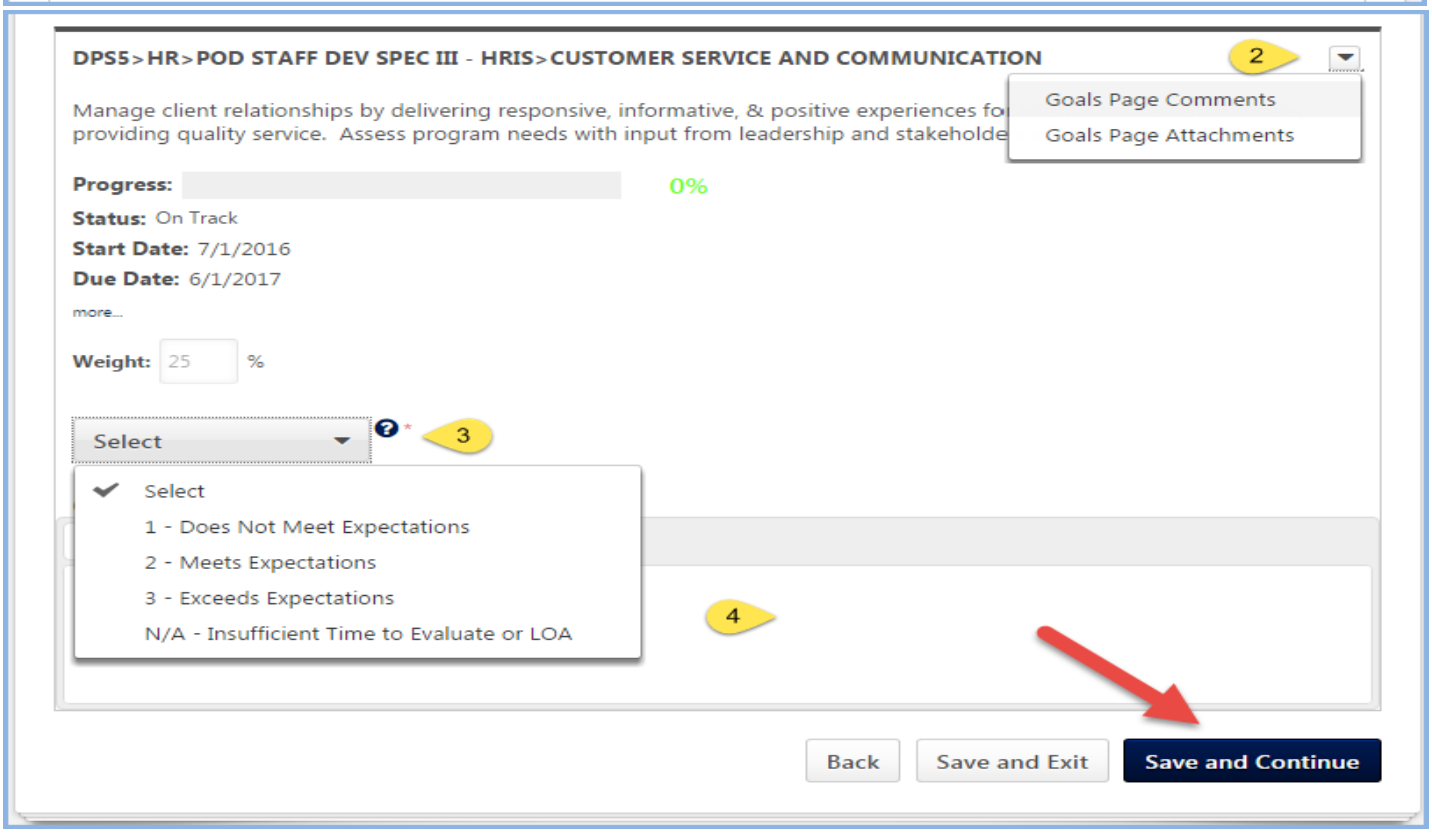


7. Click the **"Options"** to add attachments if needed. Then click "**Get Started".**

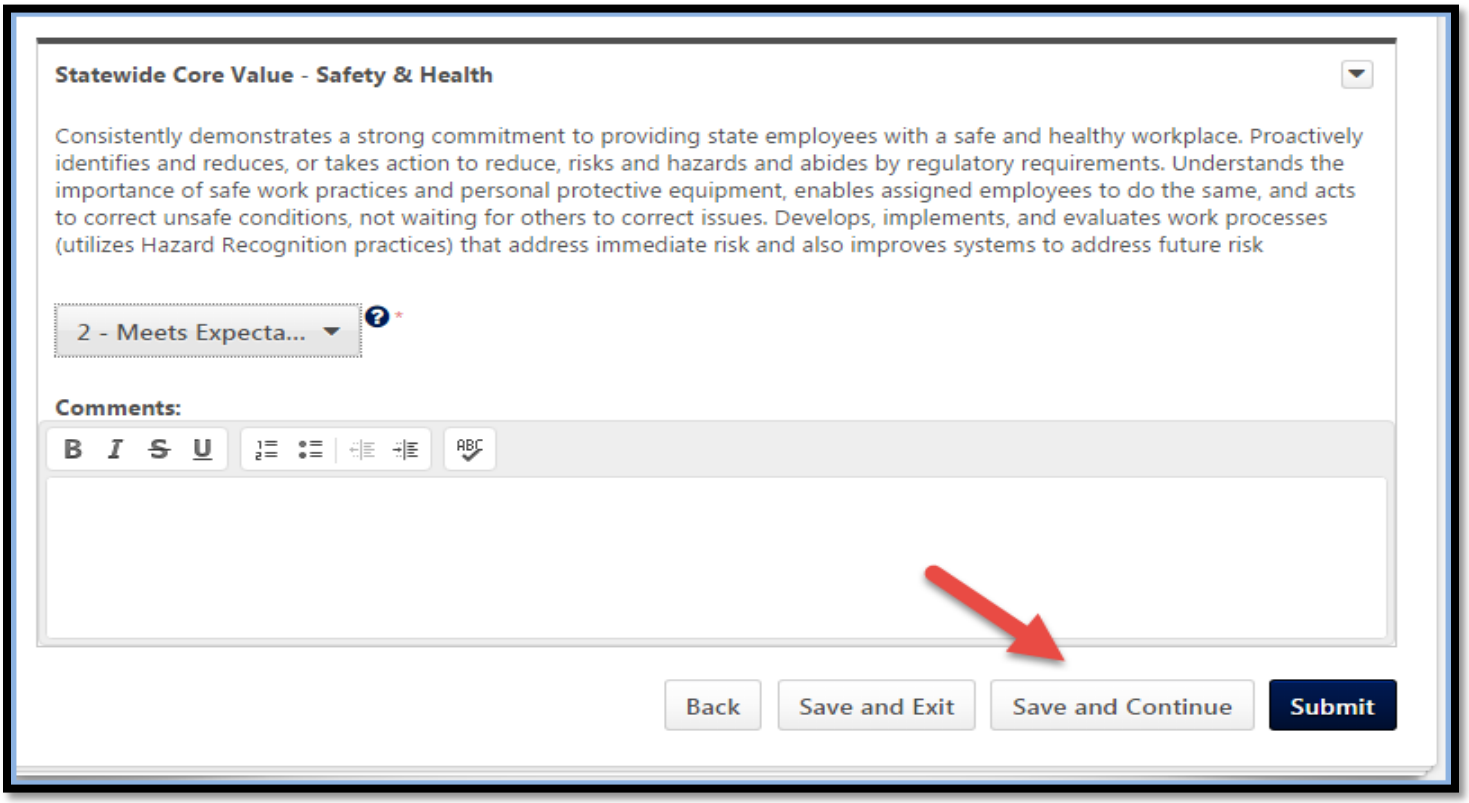


8. (1) Select the appropriate option under **“Separation Type”.** Contact your HR Representative at your facility to determine the correct separation type. (2) To review goal-specific comments and attachments, click on the drop-down menu in each goal section and select either **“Goals Page Comments” or “Goals Page Attachments.”** (3) Click on the drop down and rate each goal. (4) Below the rating drop down, there is a space to enter any comments to support the rating. Once all goals have been rated with supporting documentation, click “**Save and Continue.**”





9. You will then rate each value and provide any supporting comments just as was done for the goals. If you have already added comments to the DPS Values Goal in Step 8 above, you may simply reference those comments by adding "See Values Goal". After rating each value, scroll to the bottom and select **"SAVE AND CONTINUE".**



10. The Summary screen shows the ratings you assigned your employee. Click **"Back"** if you need to make changes. Click **"Submit"** if you are ready to send the task to the Employee Sign Off Step.

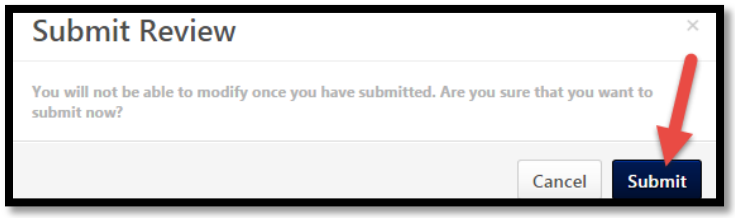
Summary Screen Notes:

The system calculates the **Goal Rating** in each section based on the rating assigned to a goal, multiplied by the weight of that goal. The overall rating in the **Organizational Values Rating** section is calculated the same way. (All values are equally weighted.) The system calculates the **Overall** rating by averaging the **Goal Rating** and **Organizational Values** ratings, each being worth 50%.

The first column, **Manager Complete Employee Evaluation**, shows the ratings you selected in both the **Goal Rating** and **Organizational Values Rating** sections. **The Overall score at the bottom of the Summary Table combines the goal and values ratings for the PETS task**.

If the overall rating calculated by the system is between:	You will receive an overall rating in the PETS task of:
1.0 – 1.6	**1 = Does Not Meet Expectations**
1.7 – 2.6	**2 = Meets Expectations**
2.7 – 3.0	**3 = Exceeds Expectations**

11. Once you click Submit in the previous step, you will be prompted to verify your submission. Click "**SUBMIT**" again.



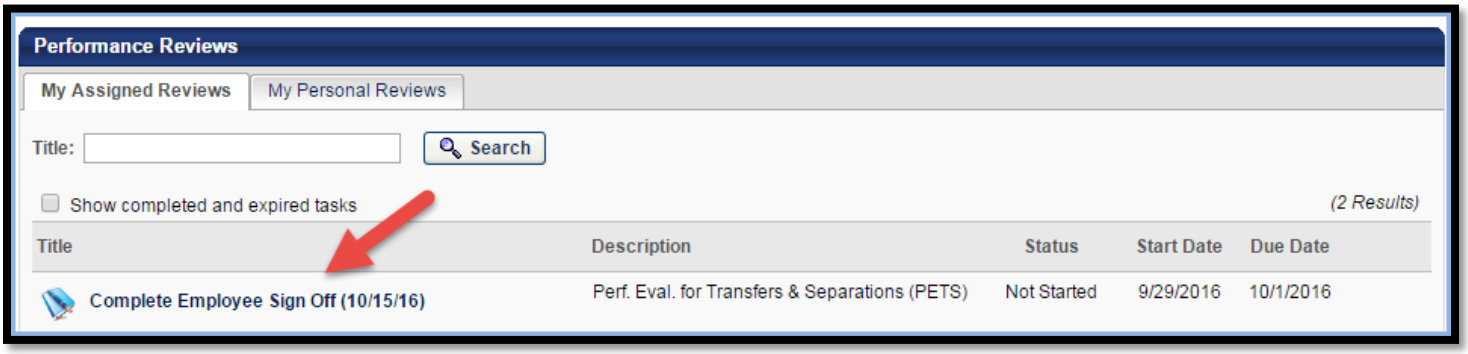
The Evaluation is then sent electronically to the employee for review and sign-off (Step 2) along with an email notification. After that, it will return to you for final review and sign-off (Step 3).

STEP 2: Employee Reviews and Signs Separations Task

The employee will have two (2) days to complete the sign off for this step. This is not a hard stop and will move to Step 3 on day 3 if it is not reviewed and signed by the employee within the 2 day timeframe. Employee self-ratings are not conducted for this task. At this step, the employee is able to review comments, attachments and ratings assigned to each goal and value. The option is also available to add attachments on the overview page and print the evaluation.

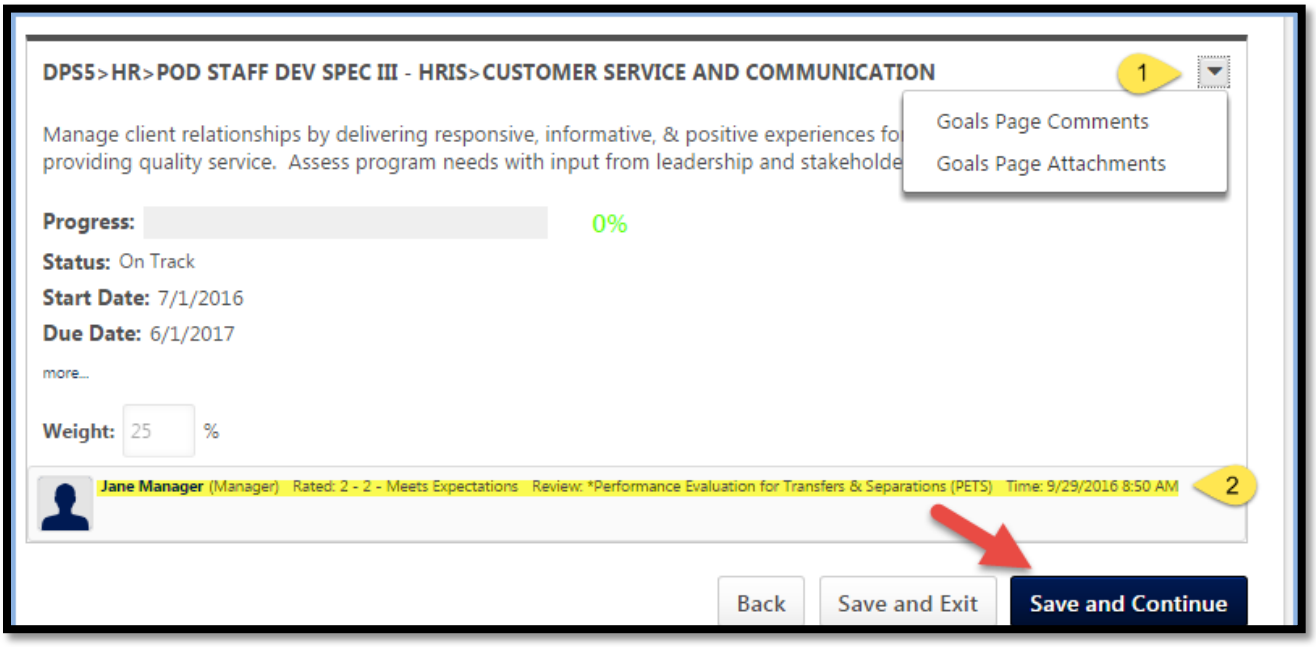
After the employee reviews their goals, values and overall rating, they have the ability to sign and to add overall comments.

1. Upon clicking the **MY TASK LIST** from the LMS/NCVIP homepage, the employee will select "Complete Employee Sign Off."



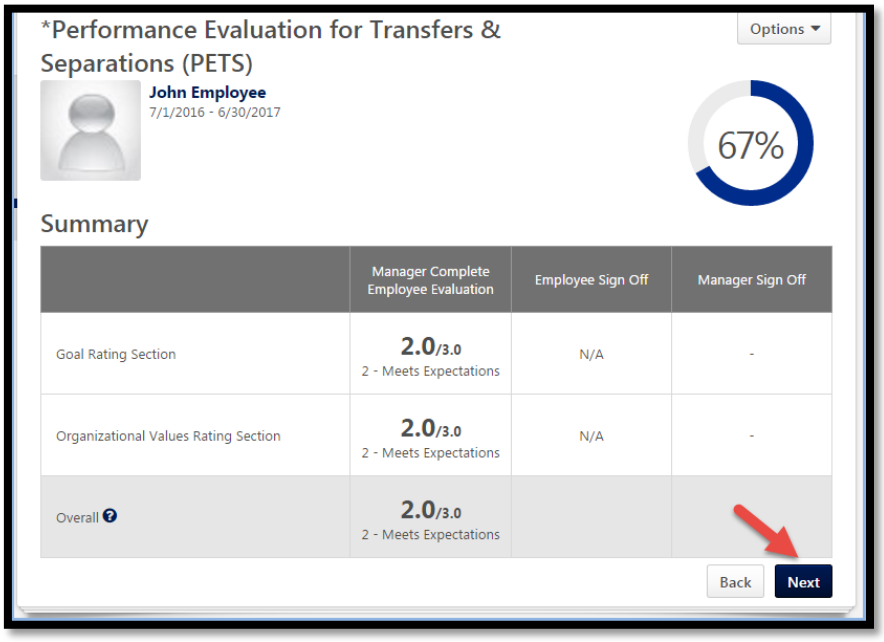
2. Click "**GET STARTED".**

3. (1) The employee can review goal-specific comments and attachments by clicking on the drop-down menu in each goal section and select either **"Goals Page Comments" or "Goals Page Attachments".** (2) The employee will see the supervisor's rating and comments (yellow highlight below) for each goal. After reviewing each goal, the employee can scroll down and select **"Save and Continue."**

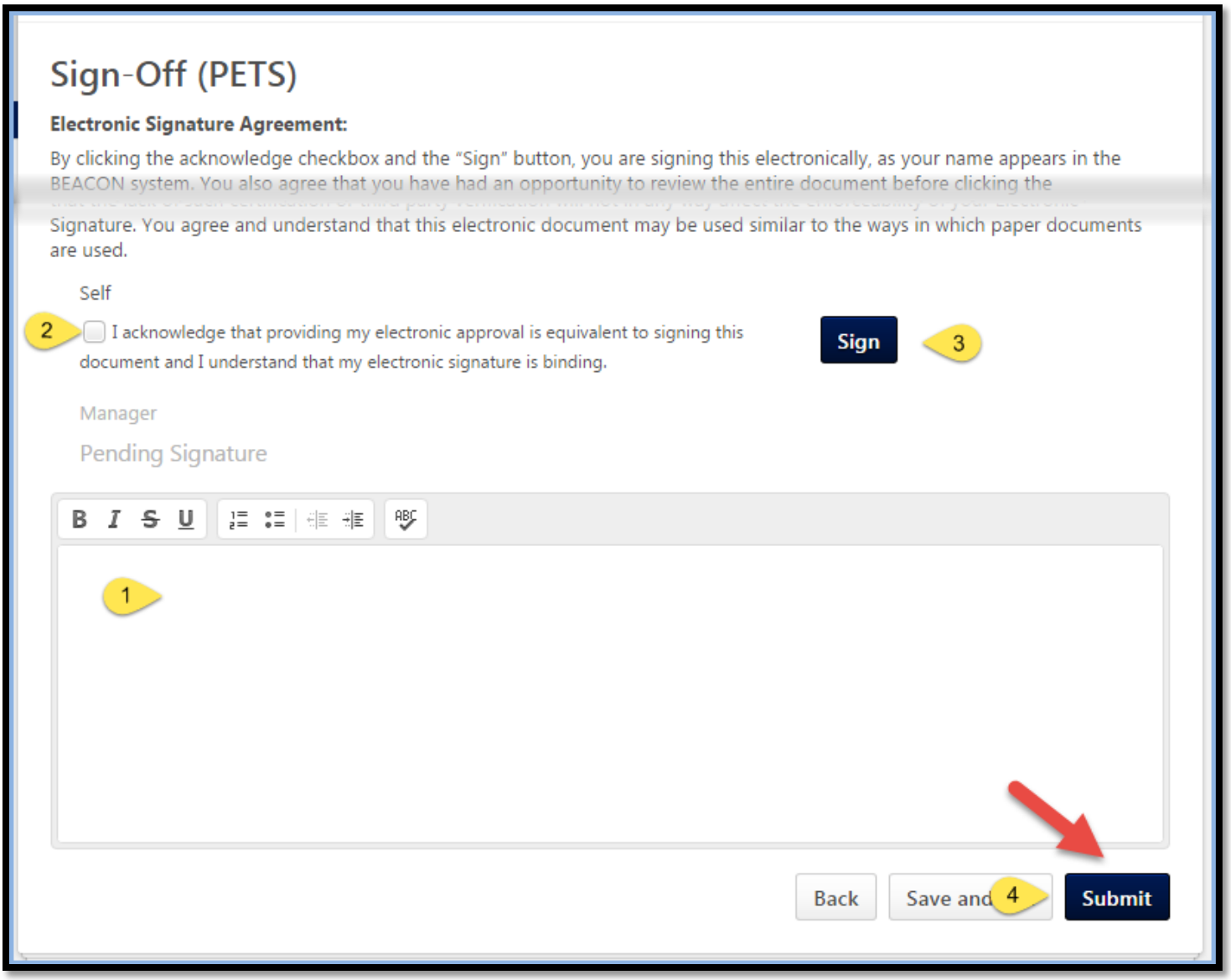


4. Next, review each value just as you did for goals. After reviewing each value, scroll to the bottom and select "**SAVE AND CONTINUE".**

5. The employee will then see a summary screen that provides you with the manager's rating of the employee on the goals and values. The employee will also see the overall rating. After reviewing, select "**NEXT".**



6. (1) The employee can make summary comments before (2) clicking in the acknowledgement box and (3) clicking the Sign button. The final step is to (4) click Submit.



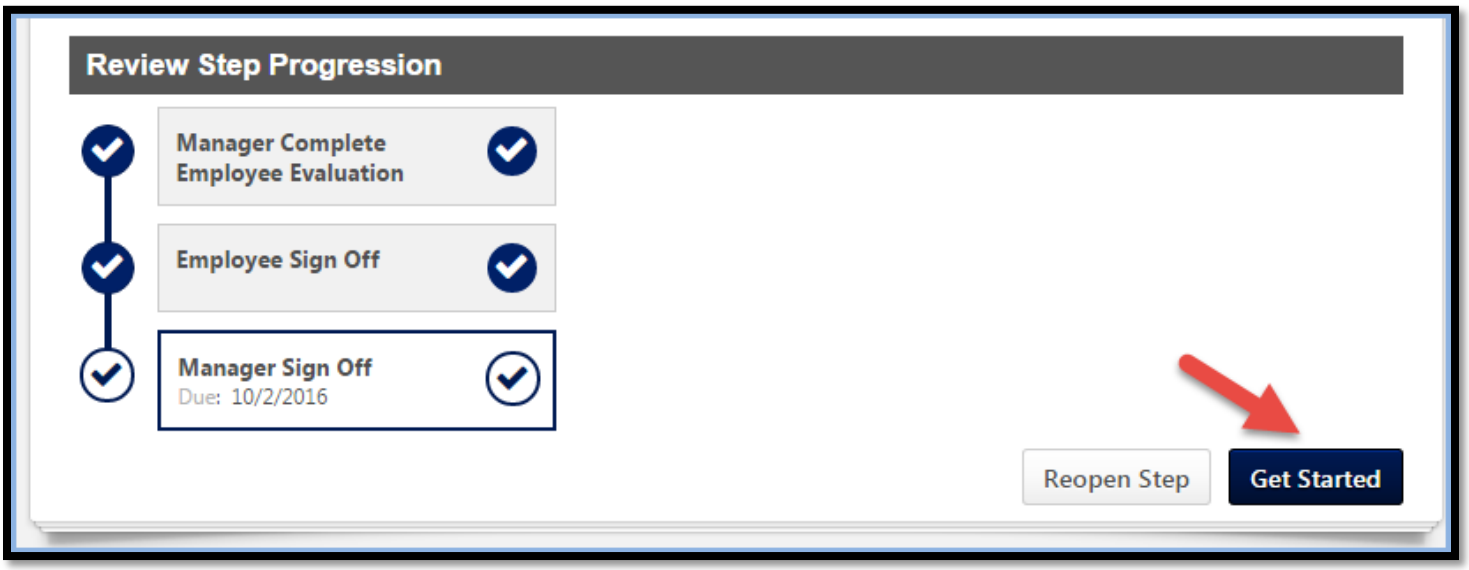
The Evaluation Task returns electronically to the manager for final signature. The manager will receive an email notification once step 2 is completed.

STEP 3: Manager Comments and Signs

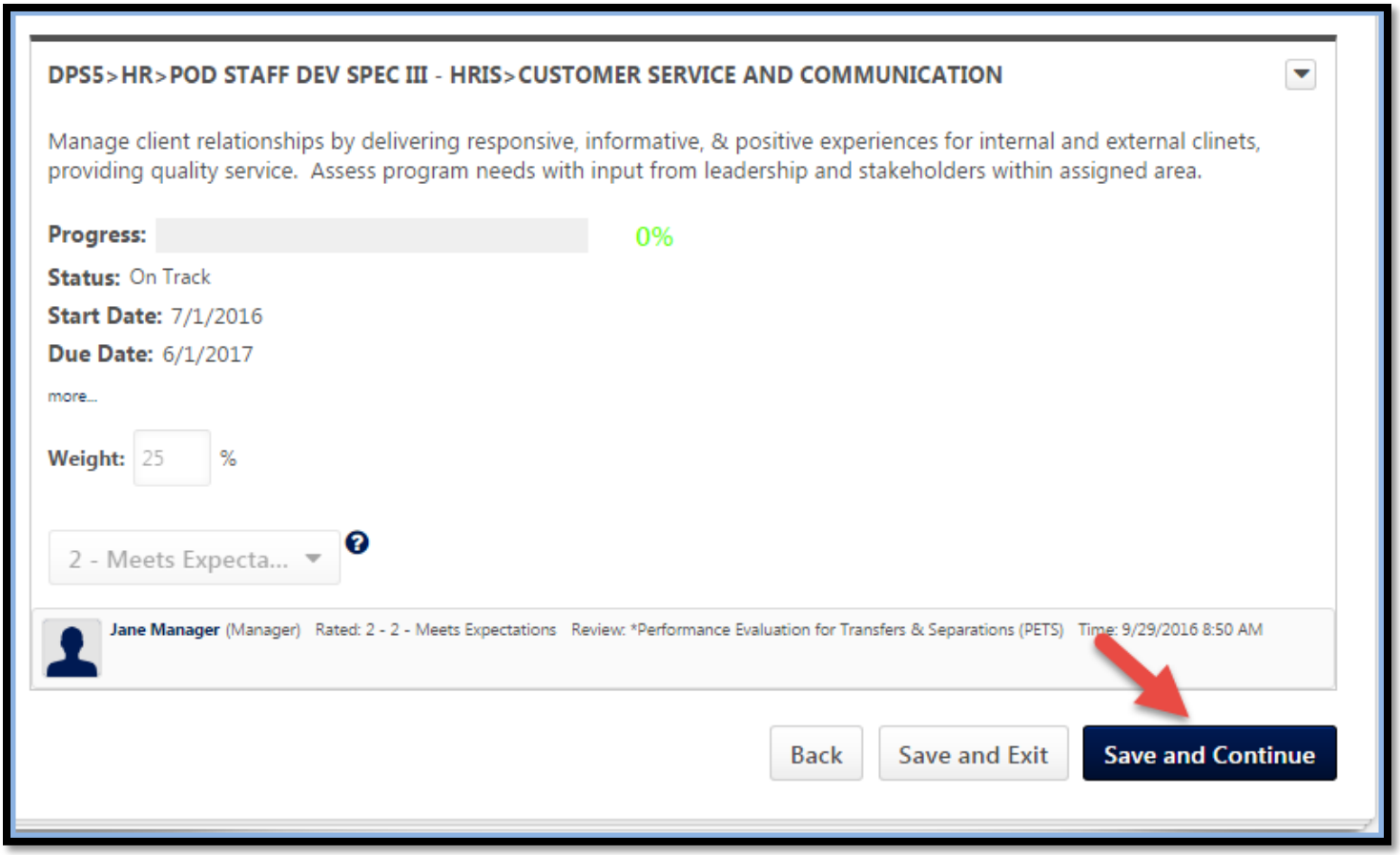
The manager will have three (3) days to complete the sign off for this step. At this step, the manager has the option to add comments and complete the final sign off. This is a hard stop and the task will not move beyond Step 3 if it is not reviewed and signed by the manager.

1. Upon clicking the "**MY TASK LIST"** from the LMS/NCVIP homepage, select the employee you are completing the Separation Task for.

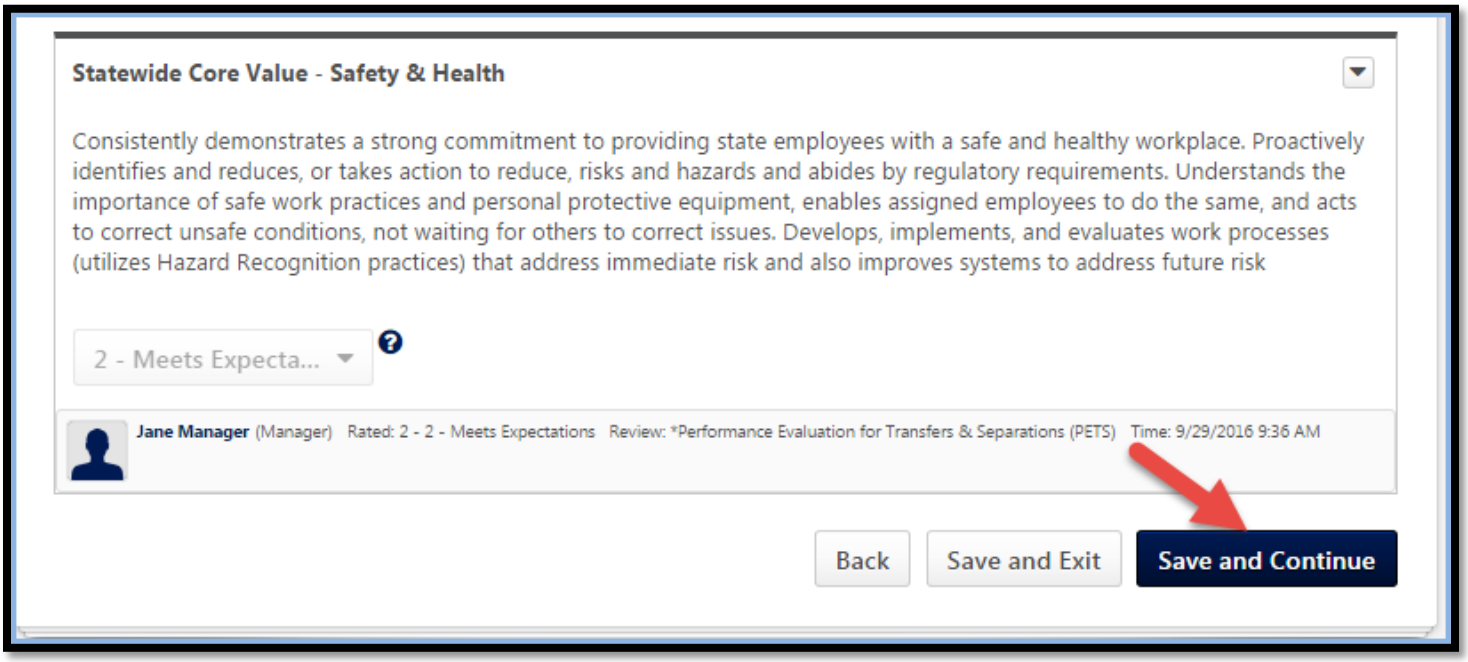
2. Click "**GET STARTED".**



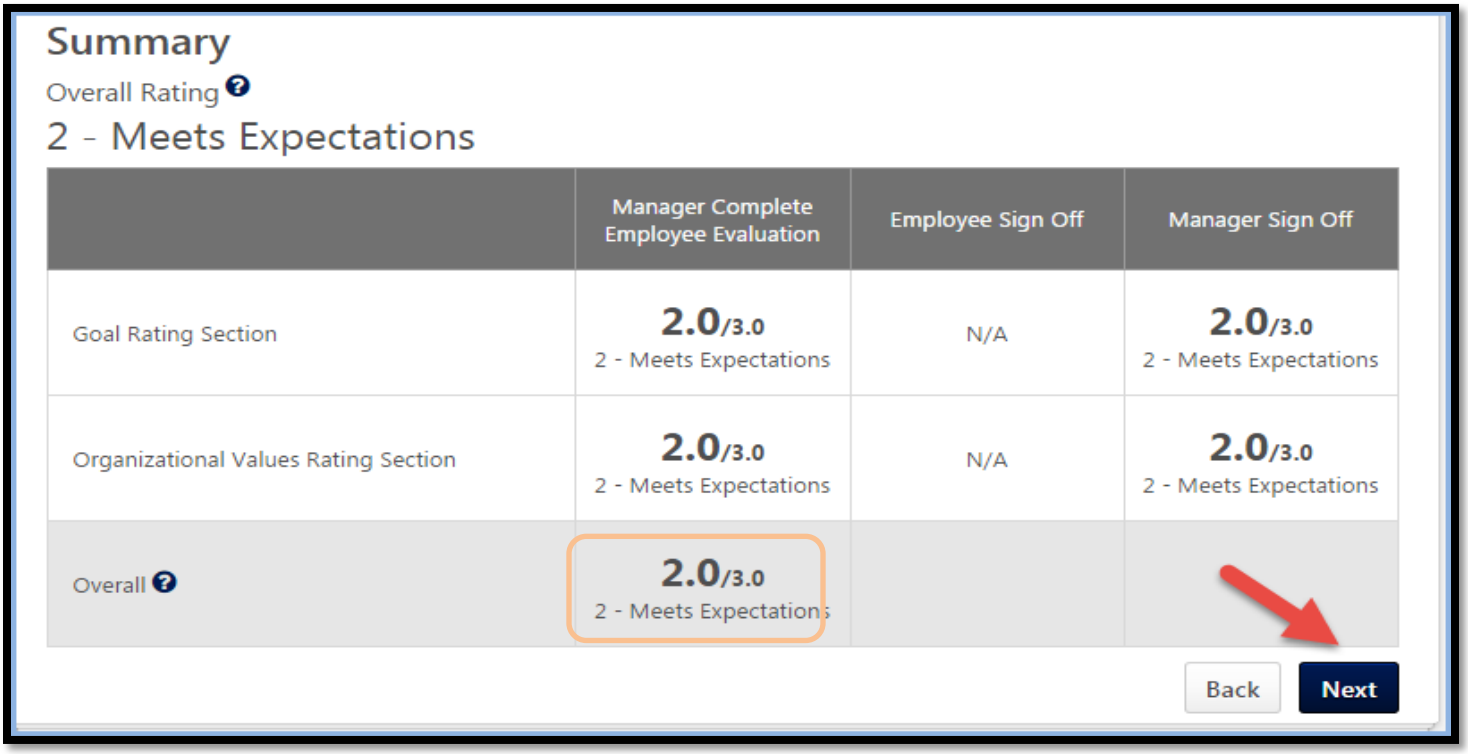
3. You will be able to conduct a final review of the Task including any overall attachments added by the employee for goals and values. After reviewing each goal, scroll down and select "**SAVE AND CONTINUE".**



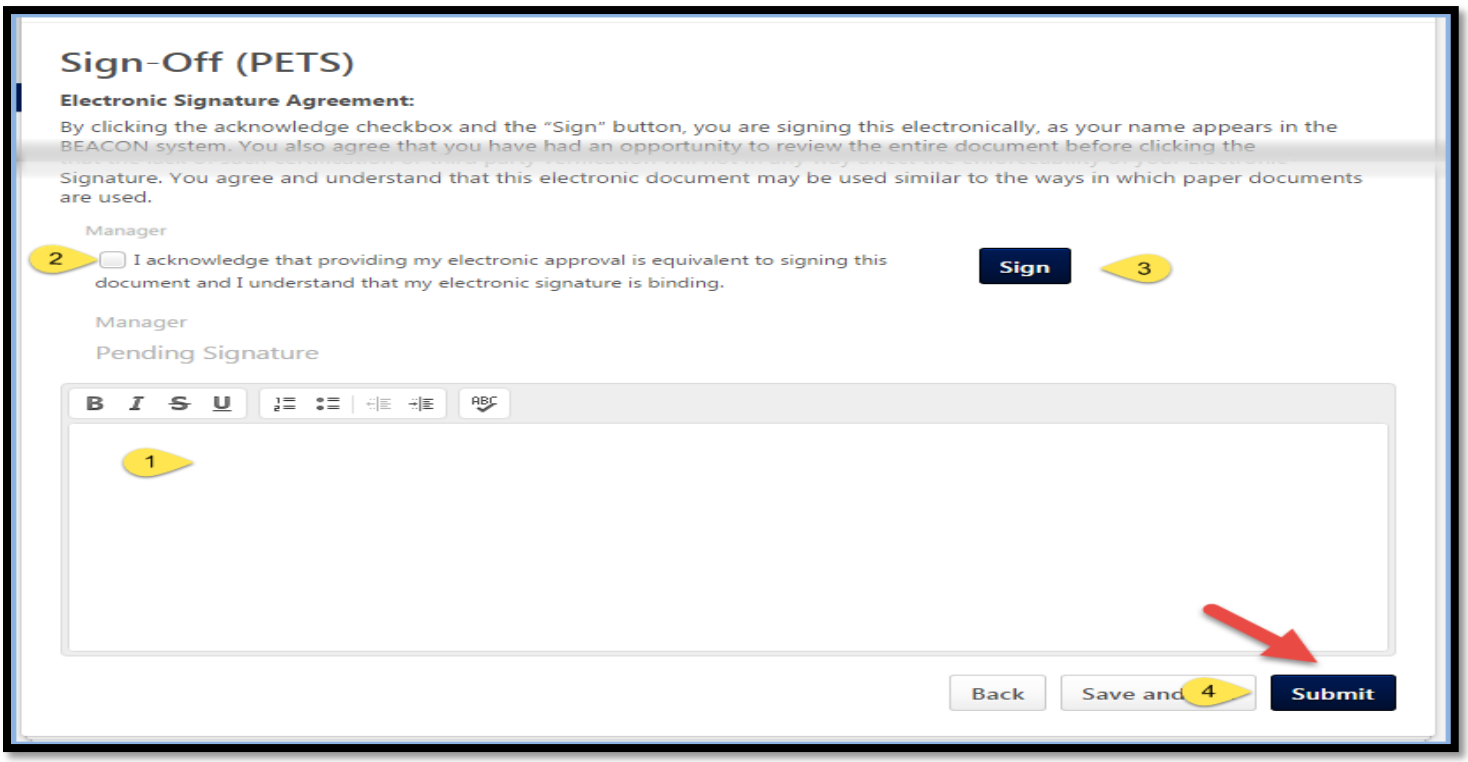
4. You will then review each value just as you did for goals. After reviewing each value, scroll to the bottom and select "**SAVE AND CONTINUE"**



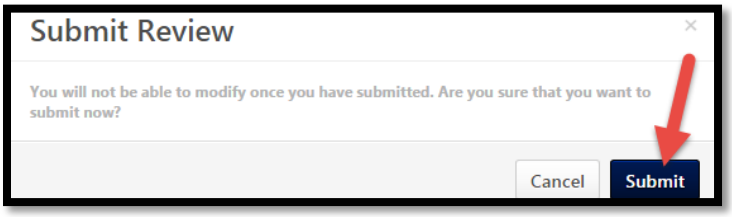
5. You will see one final overall rating. Select "**NEXT"** to advance to the signature page.



6. The manager will now complete the signature and approval of the Task by adding any (1) summary comments, (2) selecting the Acknowledgement box, (3) Electronically signing, and (4) Submitting.

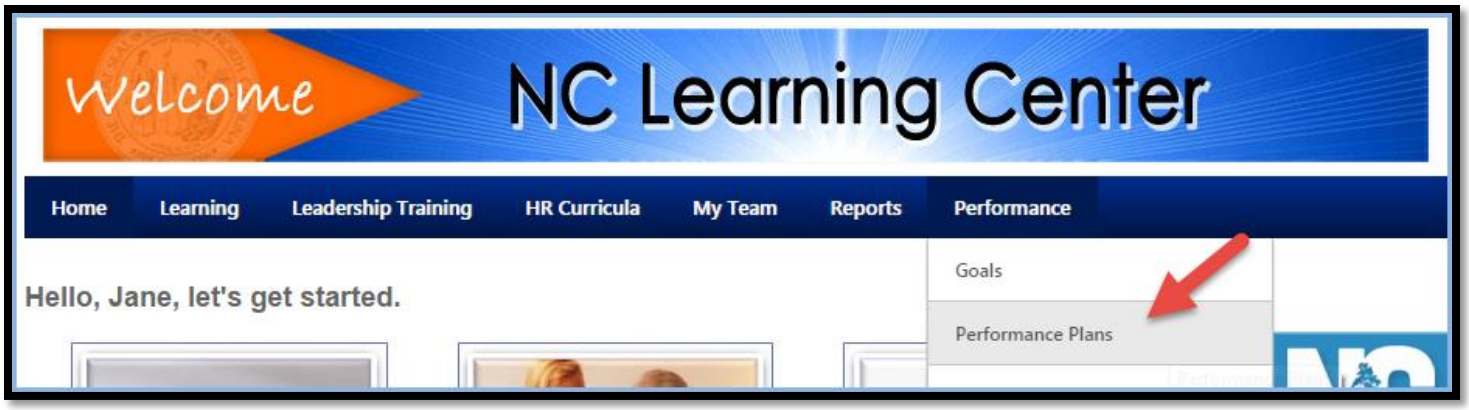
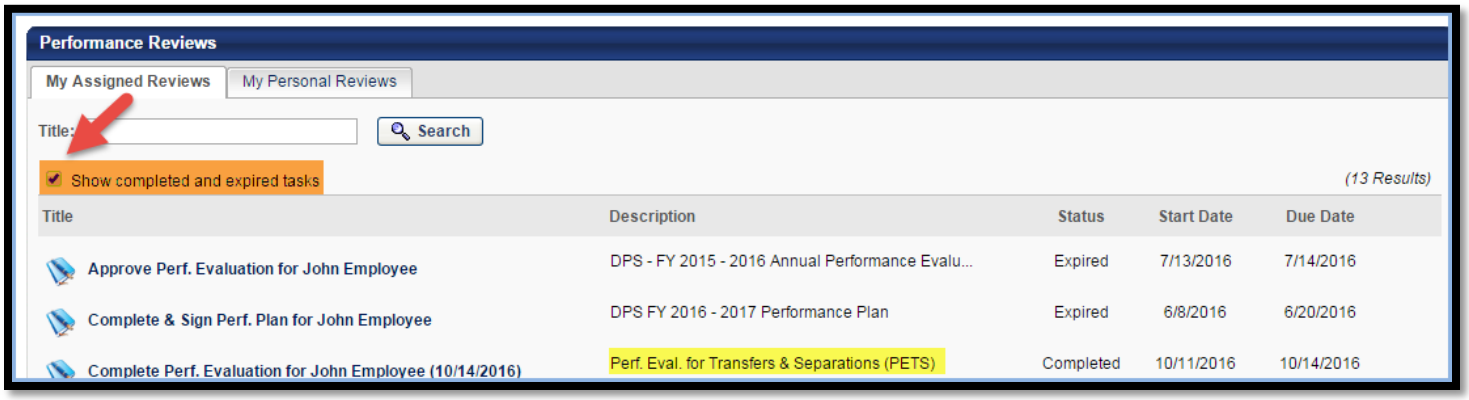


7. Click **"Submit"** again.



8. The Confirmation screen will say: **"You have completed this step of the Performance Evaluation."** You will now be 100% complete with this step (3). To double check that your Evaluation of the employee is now complete, you could then click on **"Go to Action Items.**" It should no longer be in your Actions list. The PETS task is now complete.

9. To locate the PDF of the PETS task, go to PERFORMANCE then PERFORMANCE PLANS from the main page.



10. Click the check box beside "Show completed and expired tasks." All documents for the current cycle will then be visible. Simply click on the document. It will open as a PDF document.